

Sampat Mehta Case Study

Customer

Sampat Mehta & Associates

Products and Services

Office 365

Industry

Professional Services

Organization Size

Medium (50 - 999 employees)

Country

India

April 10, 2016

Over the years, SM & Associates, experienced a change in the communication landscape and interaction with clients. With this, the firm saw a need to have a better document management and communication solution. The traditional approach of using Google Mail and Google Docs seemed unable to meet the firm's growing needs. The leadership team at SM & Associates felt a pressing business demand to move to a robust document management and e-mail communication system for the organization.

Sampat Mehta is a company of Chartered Accountants, established in 1957, who work with clients for their taxation and audit requirements. With personnel strength of about 60, they are one of the largest CA firms in Mumbai. SM & Associates forayed early into the Information Technology arena. They have had their online presence for the past 10 years including a dedicated domain-name and the use of google-mail as their E-mail communication system. Since their core competency is in auditing and taxation, SM & Associates never envisaged any major IT expenditure or even having an IT strategy. Over the years, SM & Associates, experienced a change in the communication landscape and interaction with clients. With this, the firm saw a need to have a better document management and communication solution. The traditional approach of using Google Mail and Google Docs seemed unable to meet the firm's growing needs. The leadership team at SM & Associates felt a pressing business demand to move to a robust document management and e-mail communication system for the organization.

Business Needs:

- **Domain-name issues:**

Once the employee strength crossed 50, the organization was unable to use a single domain name on google-mail since the number of free mail-id's available were exhausted. As Sanjay Rambhia a senior partner within the firm points out, "As the number of employees in the company grew, we were forced to use multiple domain names like sampatmehta.co.in in addition to the existing sampatmehta.com. This solution was awkward and almost embarrassing for an organization of repute. We were looking for a long term, futuristic solution which would assure scale of operations as the company grew."

- **Lack of Mobility:**

With the organization growing at a fast pace and clients spread over various cities and locations, there was a pressing need for employees to be able to access documents and e-mail on-the-go. If employees were on the move, they had to access the e-mail application from the browser which wasn't very user-friendly. Some information was available only on individual machines in the Head Office. Employees were unable to access information from "anywhere/anytime". Mobility was the need of the hour.

- **E-mail application user-unfriendly:**

Employees on the go complained that the desktop version of google-mail was non-intuitive and did not provide ease of use. Sometimes employees experienced issues while trying to open Microsoft Word and Excel files on google-docs. Since most of the work in the organization was on Microsoft Word and Excel, Sanjay states that this was worrying. He adds "The freeware google-mail and google-docs worked well for us during the time when we were a small organization. As we grew, we realized we needed a proper licensed version of a communication and document management system which would ideally come bundled with all the required features and not constrain us in any way."

Sampat Mehta & Associates were introduced to TechGyan by Classic

Systems , their Technology Service Provider . TechGyan stepped in and worked closely to define their IT communication and document management strategy. After looking at various solutions available in the market, SM & Associates zeroed in on Microsoft's Office 365 as an integrated solution for all their technology issues. Office 365 provided SM & Associates several solutions bundled together like the e-mail communication system (Microsoft Outlook on the cloud), completely integrated document and version management solution on the cloud and Skype for Business for internal communication. By adopting the Office 365 online suite, SM & Associates turned around an unfavorable situation to its advantage. This bundled solution proved to be highly valuable to SM & Associates.

Key Benefits:

Mobility and seamless accessibility of documents:

Office 365 provides users 'OneDrive for Business' which is a secure and reliable cloud storage solution. All documents are stored in 'OneDrive for Business' to ensure data consistency and proper versioning of files. Employees can access any document from anywhere which includes their Apple or Android mobiles or tablets. This has provided the much-needed mobility to employees and has enhanced efficiency. Clients in turn are sitting up and noticing better services since employees are equally productive online (in office) and offline (at client locations).

Robust e-mail communication:

Microsoft Exchange is the new e-mail communication system and is very intuitive and user-friendly. The Email experience whether online using a browser , or offline, using Outlook Client , is the same. Email Productivity has gone up by about 20% since there is a complete sync of Mails, Calendar, Contacts across all devices. With e-mails being delivered as a Cloud Service, employees can access e-mails on the go or on their hand-held devices as well. And with Office 365 you are assured of 99.99% availability at all times without having to manage the hardware or software. With abundant licenses, the issue of multiple domain names is history now. The ability to link documents and attachments seamlessly through any device provides peace of mind to

the employees because they can be sure of getting the correct file version from 'OneDrive'.

Seamless Integration and migration:

The migration to Office 365 has been smooth and seamless throughout. With very few initial hiccups, SM & Associates moved onto the new integrated solution with efficiency and ease. Employees at SM & Associates experienced a smooth transition to the new world of 'Cloud' solutions offered by Microsoft. The issue of different versions of the Operating System and other software applications has been completely resolved. On the Cloud based solutions, software version issues are non-existent since the latest product versions and the most up to date features are always available.

When asked about the difference in terms of cost as compared to the earlier solution, Sanjay was quick to state "The cost has definitely gone up from zero to a number, but with that we now have a very robust solution and immense peace of mind. All employees are benefitting and experiencing improved efficiency through the bundled solutions provided in the Microsoft Office 365 suite. There is no price tag which you can really put for that."

Suresh Ramani, CEO of TechGyan, further adds , " Sampat Mehta & Associates is one of the Top CA firms in Mumbai who have built their reputation on the basis of Quality of Service . With Office 365 , TechGyan has delivered not just an Email Solution , but a complete Productivity Platform which in our estimates has enhanced Employee Productivity by over 20% and will over time keep adding value and constantly enhance the Service level at Sampat Mehta & Associates."